

CLEAResult[®]

NASEO Request for Information (RFI)

Implementation Options for Home Energy Performance-Based Whole-House Rebate Program and High-Efficiency Electric Home Rebate Program

Thank you for the opportunity to provide ideas and information to the National Association of State Energy Officials (NASEO) for the implementation of the Home Energy Performance-Based Whole-House Rebate Program (HOMES) and the High-Efficiency Electric Home Rebate Program (HEEHR).

We are excited to present our expertise and insights for these programs for review by NASEO and state energy offices. Our primary contact for more information or further RFIs/RFPs is included in the sections below.

CLEAResult authorizes NASEO to publish and distribute this response to the NASEO RFI on its website and through other means to the states and general public. We have included no confidential or proprietary information in our response.

We recognize the complexities and celebrate the uniqueness of each individual state. Creating a one-size-fits-all solution can be a challenge, but we're confident our experts have developed a flexible solution that honors the goals of the legislation and allows each state to make it their own.

We would be honored to help bring these programs, and most importantly, their impact to life.

Sincerely,



Divakar Jandhyala

Chief Product & Technology Officer

Primary contact email:

CLEAResult_BD@clearesult.com

CLEAResult State-Based Energy Solutions

Networks and access to

Connections:

- ✓ Consumers
- ✓ Contractors
- ✓ Retailers

Custom solutions built on

Experience:

- ✓ National
- ✓ State
- ✓ Local
- ✓ Utilities
- ✓ Commercial
- ✓ Private

Billions in savings inform

Results:

- ✓ Planning
- ✓ Implementation
- ✓ Fulfillment
- ✓ Support
- ✓ Reporting

Program performance data informs

Reporting:

- ✓ End-to-end data capture and reporting
- ✓ Auditing and dollar-destination tracking
- ✓ Data-driven continuous improvement

Energy Savings

CLEAResult[®]

We change the way people use energy.™

Category 1: Comprehensive Program Design



1,650+
active
programs



\$1B+
incentives
managed
annually



99%
client retention
past 5 years



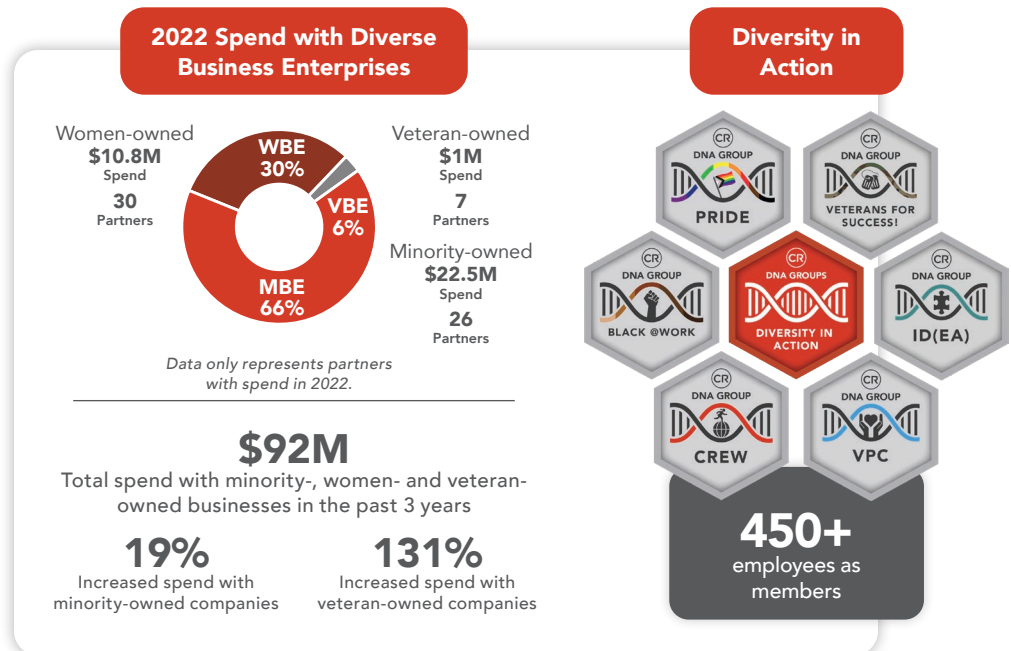
600+
clients in U.S.
and Canada

Company Characteristics

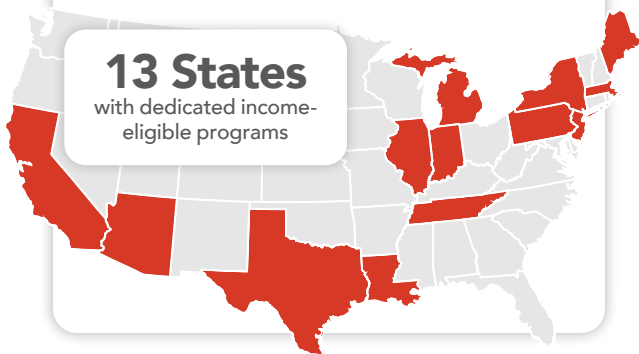
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Our Commitment to DEIA

CLEARresult is fully committed to equity, diversity, inclusion and accessibility (DEIA) in everything we do—for our programs, partners and our people. Our Diverse Partners Program develops relationships with diverse business enterprises to help deliver the vast array of energy services we offer. As an employer, we’re committed to a safe, respectful and inclusive employee experience for everyone. Our employee-led Diversity in Action (DNA) groups offer resources that foster career growth and host heritage and awareness events that educate team members companywide.



Income-Eligible Programs



2022 Lifetime Impact of LMI Programs:

\$210 Million

in savings to income-eligible households on energy bills

431,355

metric tons of CO₂ emissions averted solely from income-eligible programs

1,650+

active energy programs across U.S. and Canada

Description of Programs

CLEARresult currently has over **1,650 active energy programs** across the U.S. and Canada, including dedicated low- and moderate-income (LMI) programs in 13 states that offer the full range of our residential energy efficiency services. In 2022 alone, these programs delivered **\$210 million in savings** to income-eligible households on energy bills.

TVA Home Uplift: Served over **1,350 Tennessee homes in 2022** with a holistic approach to energy efficiency and weatherization, **saving an average of 4,472 kWh per home while earning a net promoter score of 93.**

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Multi-family EVs: The [California Energy Commission](#) awarded [CLEARresult a \\$2 million](#) grant to speed up affordable access to electric vehicle charging infrastructure. The project will serve over 300 multi-family households with at least 100 Level 2 EV charging ports. **Approximately 70% of the housing units are expected to be affordable housing, exceeding the grant’s goal of 50%.**



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Program Goals

Market Transformation

CLEAResult works across North America with millions of households to complete hundreds of thousands of residential weatherization, HVAC, and other energy saving improvement projects on behalf of our clients. These opportunities all share a common goal—to **turn policy, regulations and community input into successful energy programs that benefit people and the planet**. This goal is reflected in the Inflation Reduction Act (IRA) and remains our top priority for transforming the market through program design. We're committed to maintaining our people-first mindset that creates **an easy, engaging and equitable experience** for all who participate.

Elements of A Successful Program Design:



Speed to Market

ensures that as fast as funding is available, operations are in place and the market is primed to act.



Staffing and Expertise

make sure the right people are in the right place to seamlessly serve their communities meaningful energy savings.



Customer Awareness

built from the ground up develops trust and creates strong local demand for programs.



Stakeholder Engagement

allows for clear alignment and easy collaboration with everyone needed to successfully implement new programs.



Tracking and Reporting

with CLEAResult ATLAS™ keeps all program activities for consumers, contractors and retailers in a single system.

A Single Program Approach

CLEAResult recommends a single program approach for state energy offices to manage all IRA-funded home energy rebates, including both HOMES and HEEHR rebates. This program design would serve consumers at any income level as they complete any of the applicable upgrades to their home. This design works with both **measured and modeled savings** and is applicable to all building types including both single- or multi-family.

Our marketing and awareness campaigns will drive consumers and contractors to a program website where they will find all available energy rebates, with an option to include information or access to complimentary rebate programs managed by utilities.

The program website will be used to qualify each participant according to the defined household income criteria and show people exactly which rebates they're eligible for and how much they can expect to save, whether it is HOMES or HEEHR rebates. This gives consumers **a single place to participate** and eliminates potential confusion.

All outreach efforts will funnel to the same site and **build awareness across a broad set of communities**. People can visit the program website or speak with a representative at one of our contact centers to receive proof of eligibility in the form of a rebate coupon or bar code which can be used at a retail counter or with a contractor. This simplified process benefits the consumer, contractor and retailer, ensuring they feel confident they have made the most of every available incentive.

Focus on Equity

A single program approach is also the most equitable path for **reaching low- and moderate-income households**. A single entry point for all consumers avoids silos for different income levels. We will tailor the program information for the unique communities within each state and clearly guide each consumer through the rebate journey using relevant language options for non-English speakers and other area-specific best practices.

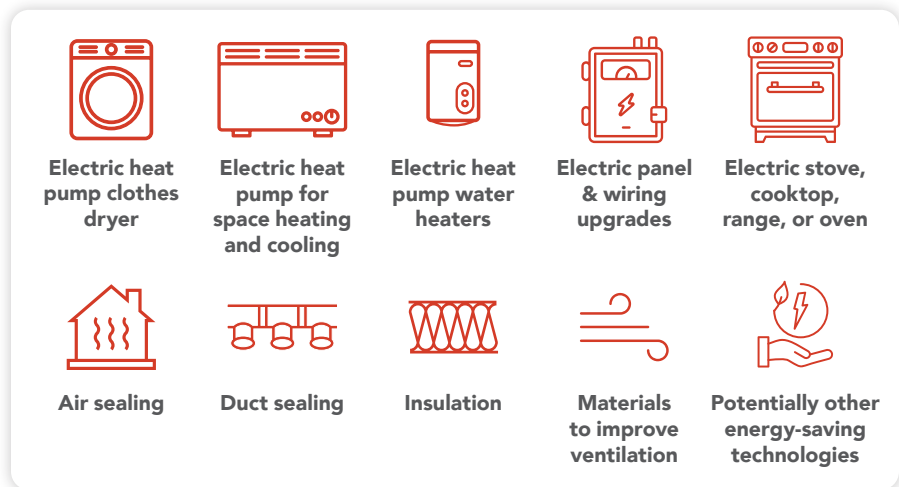
CLEAResult ATLAS™ Qualify, our automated income-verification tool, is recommended to speed up the processing time and achieve participation goals faster.



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Eligible Technologies

Our teams will collaborate with local contractors and retailers to create a qualified product list that will serve the community best. Our teams **partner with over 30,000 contractors and retailers nationwide** to deliver energy efficiency programs that meet the needs of each local market. Our program design offers a simple registration process to become an approved supplier in the program. [CLEAResult ATLAS™ Partner Hub](#) streamlines communication with participating program partners to ensure quality control and keep all key information in one place.



Energy Savings

A robust partner network provides critical insights about which type of savings approach (modeled, measured or combined) will be most effective for the local community. CLEAResult's program design will be effective regardless of the chosen approach. The partner network delivers front line program services, and CLEAResult supports them every step of the way ensuring all participants, including the contractors and retailers, have a positive experience with the program. Establishing this network prior to program launch will also ensure the highest level of quality control and consumer protections while maintaining flexibility in how consumers participate.

CLEAResult further recommends engaging with retailers prior to program launch with a ready-made solution for rebate coupons and register-ready barcodes to be made widely accessible at all major retailers.

Market Conditions

The top priority for a successful program design is a **streamlined experience** that makes income verification and confirmation of eligibility as simple as possible for all participants. CLEAResult will work with the State Energy Office to make it easy for participants to provide proof of meeting the area median income (AMI) thresholds for the program.

For example, proof of participation in a Federal social benefit programs, such as SNAP or WIC, could be an automatic qualifier. In addition, we can help State Energy Offices **integrate data from other state agencies** into their IRA system of record to identify income-eligible individuals automatically based on participation in other state benefit programs. The intent is to remove barriers for income qualification, making the program equitable and accessible.

The Role for Utilities

We also recommend aligning the program design with existing utility efficiency programs whenever possible. Many utility programs have a robust infrastructure in place that includes proven contractors with experience in program participation and quality installation. Utilities and State Energy Offices would be invited to collaborate, rather than compete in the same market.

Utilities will also play a key role in providing secure access to energy usage data. This data can then be integrated and used by the states for energy modeling software such as the BPI 2400-compliant energy modeling software used by contractors.

Local Expertise Paired with National Experience

Our delivery teams work to ensure quality integrations and installations like these every day. We have numerous quality assurance processes, procedures and field guidelines in place, including virtual inspections, that save consumers time. Our wealth of **experience in local codes and building permitting** through our program implementations help with this as well.

Overall, the best market conditions for a successful program will be created through active collaboration and relationship development between states, utilities, contractors, retailers and the communities they serve.



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Implementation Proposal

The Consumer Experience

The participant journey begins with awareness campaigns that include targeted marketing efforts in communities and demographics of particular interest. The consistent call to action is for people to visit the program website where they have a simple, clear path to savings.

When someone arrives at the website, they will see where they fit within the income guide and verify their eligibility in the system to discover which rebates are available to them. The system will then generate a coupon or barcode to prove eligibility which the person can then use to claim their savings from a participating contractor or retailer at the time of purchase.



Rebate Processing

The backbone of a successful program is rebate processing – one of CLEAResult’s biggest strengths. In 2022 alone, our contact centers processed rebates and paid incentives totaling more than \$270 million. Those improvements then delivered \$758 million in savings on consumer energy bills with a **total impact of \$9.6 billion** over the expected lifetime of the energy improvements.

One key factor of the rebate processing method is ensuring all eligible dollars from the program are reserved for the participant as they register. Knowing the person’s eligibility from the start allows us to **quickly and easily process payments to contractors and retailers** on the backend and reimburse them for providing consumers immediate access to the rebates.

The second key factor is having a **single system of record** to act as a financial clearinghouse for the rebate funding. This makes it simple for all program participants, including contractors and retailers, to receive the funds quickly and accurately regardless of funding source, building type or completed upgrade. This would be facilitated by a central system that is both simple and flexible.

Consumers will also benefit should states choose to collaborate with utility energy efficiency programs and offer a single rebate application process to be used regardless of funding source. A single fund reservation system also ensures budgets are managed correctly and every dollar spent is going to the right person with the proper controls in place.

Third-party certification of savings

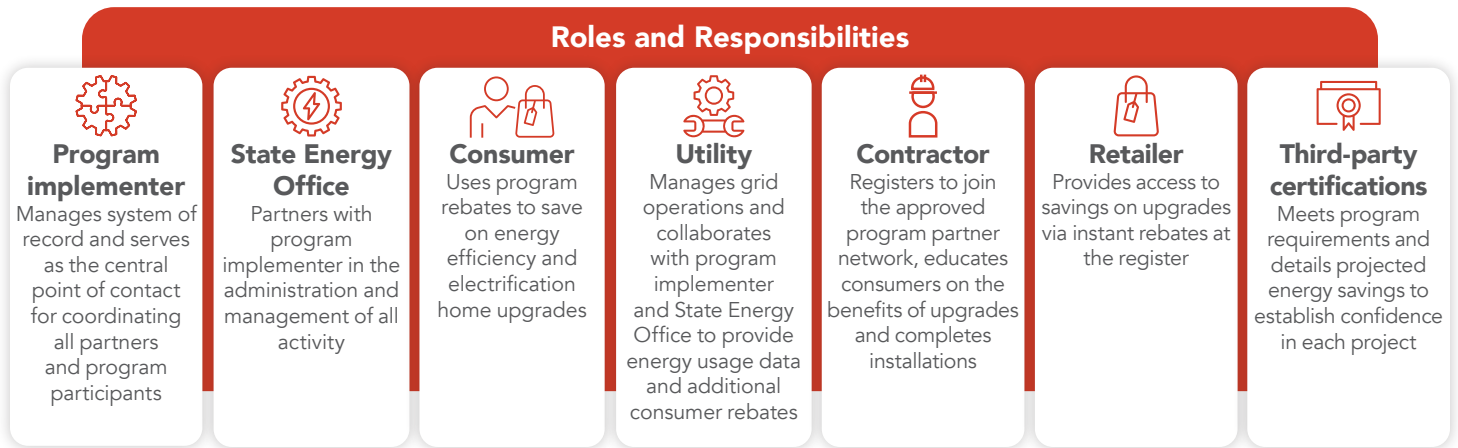
This program design also includes third-party quality control procedures to certify the improvements were installed properly. In addition, CLEAResult can perform a percentage of in-person and virtual verifications and will confirm participating contractors are available for field inspections as well.

Benefits and Comparative Advantages

CLEAResult’s comprehensive program design encourages statewide participation, especially for historically under-resourced communities. Making it easy for all households to reduce their energy use is vital to realizing the full benefits of the IRA’s programs to the grid, including peak demand management and increased flexibility. CLEAResult has **experience implementing programs across an entire state’s geography**, and we are confident this program design will maximize the IRA’s impact for our communities and our planet.



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Types of Implementation Partners

Program implementers are another key pillar of any energy efficiency and electrification program. The implementer collaborates closely with the State Energy Office to serve as the **central point of contact** for all program partners, stakeholders and participants.

Consumers moving through the participant journey may also interact with participating **local contractors, retailers, distributors, community organizations** and other outreach partners during the process, as well as software and third-party certification partners as they complete their installations.

We recognize the full range of partners needed for an inclusive, successful program is wide and recommend casting a wide net that welcomes everyone, including **diverse business enterprises**. Each state should work with the program implementer of their choice to find partners that fit the needs of their community and keep all data and communications under one roof.

Other

CLEAResult is the largest provider of energy efficiency, energy transition and decarbonization solutions in North America with more than 1,650 active programs. We have over 2,400 people dedicated to changing the way people use energy and can design and implement initiatives like HOMES or HEEHR from start to finish to **meet the local needs of every state**.

This historic opportunity to reshape our energy future will require a combination of technical know-how and consumer motivation that our people have spent nearly 40 years developing. Our team is ready and excited to talk about these capabilities and more as the state programs begin to take shape.

RFP and Contract Language

In our experience creating and responding to RFPs, we believe the following tenets lead to the best responses:

- **A clear description** of the proposal that includes clear rules of engagement, such as a prepared outline of the expected response and the page limitations within.
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- **Enough time** to allow thoughtful responses, including advanced notice of expected RFP release dates and other associated milestones in the process.
- **Requirements** on partnerships, including expectations on diversity business enterprise participation.
- **A scoring criteria framework** outlined attributing points or percentages to the sections of the response and process.



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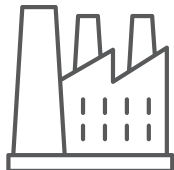
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Category 2: Program Elements



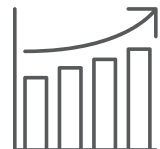
750
residential
programs



190
utility clients



250,000+
homes served
annually



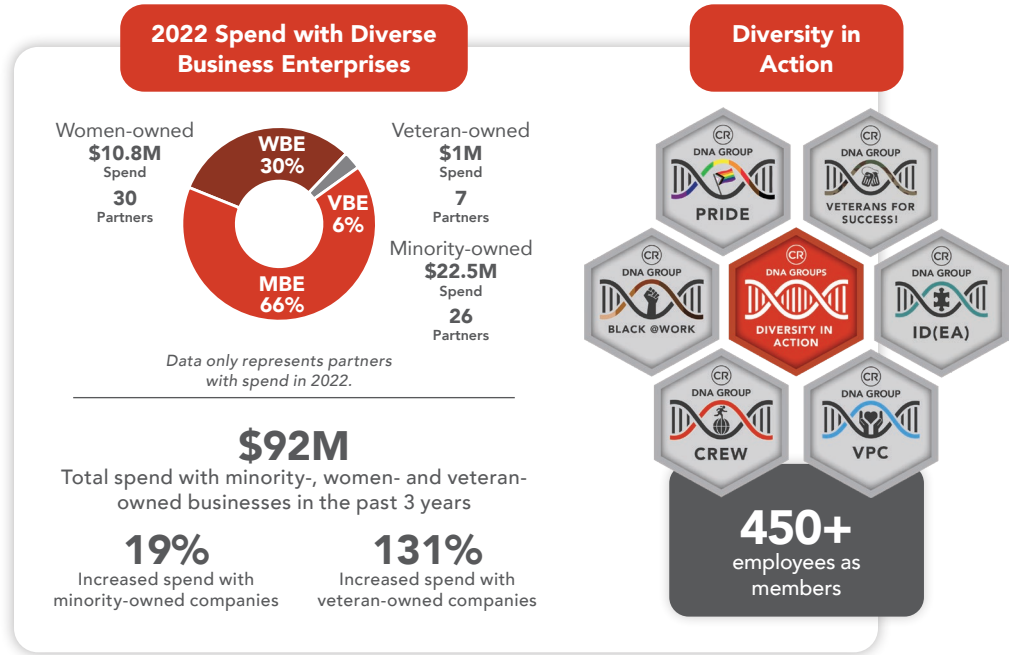
3.8M
rebates
processed
annually

Company Characteristics

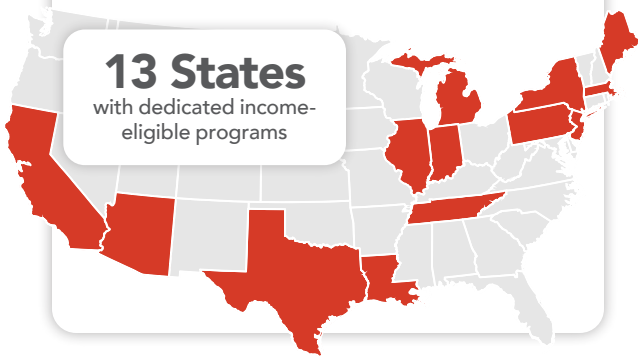
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Program Elements

There are four key program elements that neatly align with the four key participants and partners in both IRA programs:



A Simple Consumer Experience

All consumers deserve to participate in the IRA program with as few barriers as possible. The very first barrier to remove is the distinction between HOMES and HEEHR. There is no need to create market awareness on the distinction between the two programs. Consumers only need to understand that federal rebates are available through their state energy office, and one website has everything they need to save on upgrades. Focusing all attention on a streamlined process to work with participating contractors or retailers makes it easier for people to complete home efficiency upgrades and transition away from fossil fuels. Clear, uncomplicated experiences will lead to happier consumers and repeatable actions—both by participants and the people they reach through positive word-of-mouth.



The Income-Qualified Consumer Experience

Every consumer who participates in the state's IRA-funded programs will have income self-verification as their first call to action. This first step is necessary to help everyone maximize their available rebates and understand next steps, especially households who qualify for higher rebates. CLEAResult can help programs automate income verification to make the first step an easy and positive experience for all. This can be achieved online with [CLEAResult ATLAS™ Qualify](#) or other alternatives to pay-stub validation, such as using zip codes, census tracts or previous eligibility for other social benefit programs. The system of record will provide consumers with a coupon or code that can be shared with the participating retailers and contractor of their choice to validate who they are and what they qualify for. This enables a simple consumer experience with excellent quality controls.



Ready-Made Retail Solution

The coupon or code produced by the system of record will have the added benefit of being redeemable at local retail stores. Imagine the consumer has the product of their choice, walks up to the register, uses their phone or a printed copy of their coupon with a barcode to be scanned, and walks out of the store having successfully participated in the IRA program. Retailers are eager to support these efforts but need a system they can easily implement across their stores without long or complicated processes at the register or complex rules for reimbursement of the instant rebates they offer consumers. CLEAResult already works with hundreds of retailers nationwide to provide this type of solution. State Energy Offices will also have the added benefit of easily tracking participation and better understanding consumer behaviors.



Approved Contractor Network

The program will need a full and diverse workforce of electricians, HVAC, weatherization specialists and more. CLEAResult has experience managing 30,000 contractors in energy programs across North America and advocates for creating an official participating contractor network for each state's program. A registered contractor network is a strong signal of trust to consumers giving everyone confidence in the installation. It also allows for easier management and communication from the state.



A Single System of Record and the State Energy Office

Every dollar spent must be accounted for with access to a full paper trail. Rebates will be processed by the program implementer with HOMES or HEEHR funding and through contractors and retailers. Having a single system of record that tracks all this activity protects against duplicate participation and gives visibility to both the dollars spent and the incoming pipeline of participation that will be critical to success.

End-to-end data capture and accurate reporting will also allow for more operational efficiencies. Programmatic, geographic and other metrics will serve as important safeguards. A single system of record makes coordination with utility programs and their consumers easier as well, which is an area we have decades of experience implementing.



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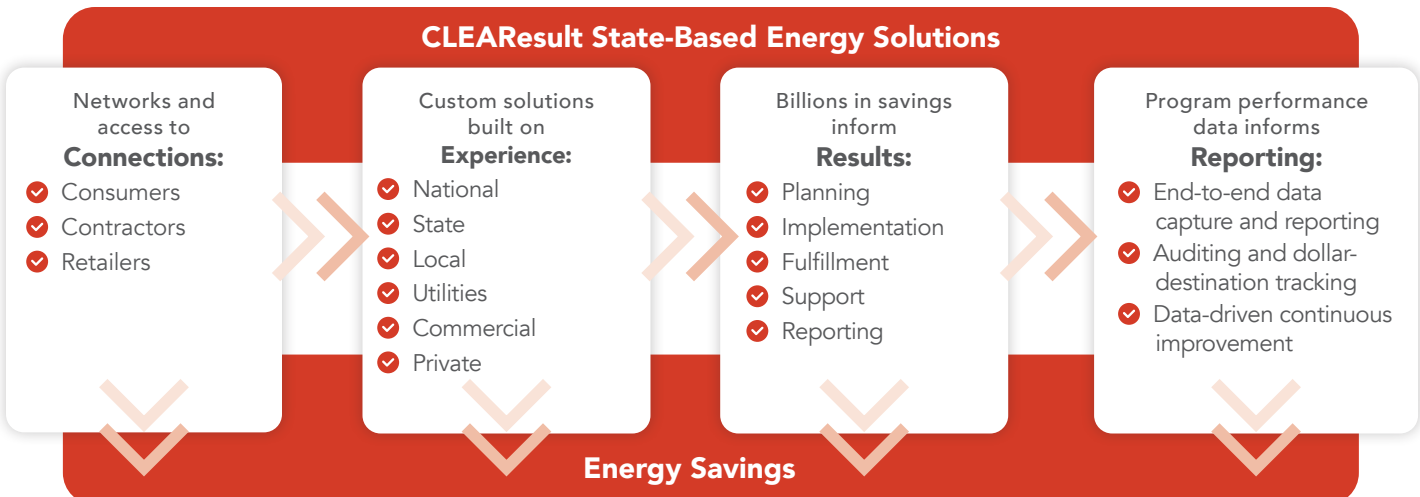
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Please refer to category one for further details on comprehensive program design.

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Category 3: Indication of Vendor Interest



1,650+
active
programs



600+
clients U.S.
and Canada



300,000+
end-use
customers
served annually



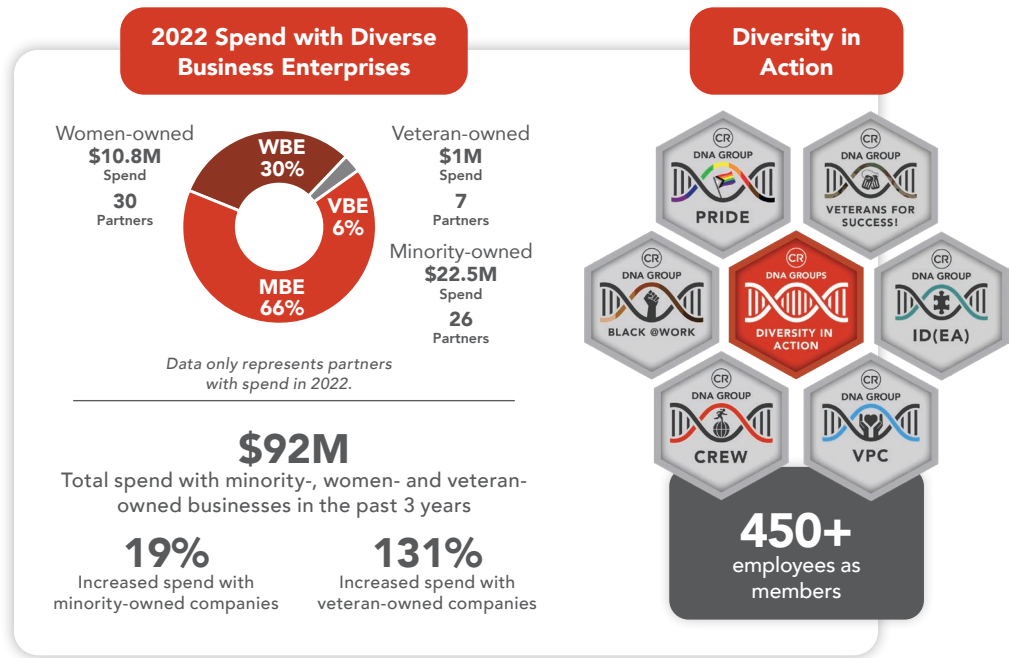
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incentives
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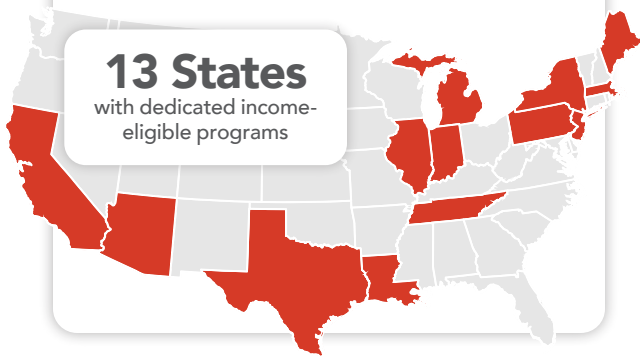
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Company summary

CLEAResult has nearly 40 years of experience designing, marketing and implementing energy programs for communities, utilities, governments, businesses and residential energy consumers to define and achieve energy efficiency goals. With a current portfolio of more than 600 clients and 1650 active energy programs, we have helped save more than 5,200 gigawatt hours of energy and more than 68 million therms annually.

Our unmatched technical expertise has helped us grow to be the industry leader and largest private company in North America exclusively focused on energy efficiency, electrification, demand response, demand-side management, and consumer-focused solutions.

While our expertise and experience extends across North America, we have deep local roots through local program teams and the relationships they foster in their communities. With a sole focus on energy efficiency, sustainability and conservation, we use our intimate understanding of our clients' needs and the unique features of their service territories to change the way people use energy.



Leading the charge in energy efficiency expertise

We deliver all-inclusive, turnkey solutions to our clients that begin with program design and quickly move to building locally-based teams and strategies that suit the communities they serve. We can build programs from the ground up or deliver "program in a box" designs that are ready to implement.

Our purpose is to make our world environmentally sustainable, and we're excited for the opportunity to make the benefits of energy efficiency and electrification available to everyone—in every state.



Our Relationships

60+ cities across 46 states and 8 Canadian provinces

600+ clients

99% customer retention past 5 years

Rebates and Incentives

\$1B+ managed program incentives

3.8M+ rebates processed

\$270M+ incentives paid by customer service team

Programs and Products:

1,650+ energy programs

750 residential programs

300,000+ end-use consumers served annually



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